

(24B) FreeForm Implementation LVC

Oracle Enterprise Performance Management Cloud

DURATION

2 Days

MODULES

19 Lectures

COURSE CODE

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Course Overview

After completing this course, you should be able to: Create and manage a FreeForm application Manage dimensions, metadata, and data Load and enter data Report on data Set up application security Manage business rules Administer FreeForm in Smart View

What You Will Learn

FreeForm Overview

- Course Objectives
- Course Agenda
- Lesson Objectives
- Oracle Cloud Enterprise Performance Management Overview
- Cloud EPM Standard and Enterprise Services
- About FreeForm
- Benefits and Features
- FAQ
- Multidimensional Analysis
- About Cubes and Dimensions
- Cube Types
- Comparing Single Cube to Multicube
- Overview of Clients and Tools
- FreeForm Business Case
- Accessing the FreeForm Environment
- Summary

Designing a FreeForm Application

- Lesson Objectives
- FreeForm Implementation Process
- Analyzing and Planning Implementations

- Application Design
- Dimensions: Overview
- Identifying Dimensions
- Dimensionality Options and Applicable Use Cases
- Attribute Dimensions
- User-Defined Attributes (UDAs)
- Checklist for Implementing FreeForm
- Summary

Navigating FreeForm

- Lesson Objectives
- Logging On to FreeForm
- Navigating from the Home Page
- Exploring the Navigator Menu
- About the Application Cluster
- Reviewing Application Properties
- Reviewing Application Settings
- Valid and Invalid Intersections
- Cell-Level Security
- Data Exchange: Data Integration
- Data Exchange: Data Maps
- Managing Jobs
- Data Entry: Overview
- Business Rules: Overview
- Setting Up User Preferences
- Managing Connections
- Summary
- Practice 3

Creating FreeForm Applications

- Lesson Objectives
- Creating the FreeForm Application: Overview
- Selecting the FreeForm Business Process
- Creating an Application with an Outline File or Snapshot
- Creating an Application with the Application Creation Wizard
- Calculation and Reporting Cubes
- Managing Cubes
- Clearing Cubes
- Viewing Cube Details
- Improving Cube Performance
- Active and Passive Cubes
- Summary
- Practice 4

Designing Dimensions

- Objectives
- About Dimensions and Members
- About Dimensions and Members (continued)
- Default Dimensions and Dimension Types
- Default Dimensions (continued)
- Custom Dimensions
- User-Defined Elements
- Design Considerations for Attributes and UDAs
- Design Considerations for Attributes and UDAs (continued)
- Smart Lists: Overview
- Sparse and Dense Dimensions
- Label-Only Members
- Dimension and Member Names
- Dimension Properties
- Member Properties
- About Member Aliases
- About Dimension Hierarchies: Genealogy
- About Dimension Hierarchies: Generations and Levels
- Property Value Inheritance
- Alternate Hierarchies
- Designing Account Member Hierarchies
- Consolidation Order
- Dimension Calculation Order
- Period Aggregations
- Member Formulas
- Data Storage Options
- Customizing Time Dimensions
- Period-to-Date Hierarchies
- Performance Settings and Data Type Evaluation Order
- Performance Settings and Data Type Evaluation Order (continued)
- Enhancing Accounts Dimensions
- Enhancing Accounts Dimensions (continued)
- Summary
- Practice 5

Managing Dimensions

- Objectives
- Managing Dimensions and Members
- Creating Dimensions
- Modifying Dimensions
- Creating Members
- Creating Shared Members
- Modifying Members

- Modifying Members (continued)
- Moving Members
- Sorting Members
- Finding Members
- Deleting Members
- Creating Aliases
- Summary
- Practices 6

Setting Up User-Defined Elements

- Objectives
- Creating Member Formulas
- Creating Attributes
- Creating Attributes (continued)
- Assigning Attribute Values
- Adding User-Defined Attributes
- Adding User-Defined Attributes (continued)
- Managing Substitution Variables
- Managing Substitution Variables (continued)
- Managing User Variables
- Managing User Variables (continued)
- Creating Smart Lists
- Creating Smart Lists (continued)
- Associating Smart Lists with Members
- Forms and Smart Lists
- Summary
- Practices 7

Importing and Exporting Metadata

- Objectives
- Metadata Import Export: Overview
- Metadata Import File Structure
- Loading the Import File
- Delimiters
- Importing Metadata: Creating Imports
- Importing Metadata (continued)
- Saving Jobs to Import Metadata
- Saving Jobs to Import Metadata (continued)
- Scheduling Jobs to Import Metadata
- Scheduling Jobs to Import Metadata (continued)
- Exporting Metadata: Creating Exports
- Exporting Metadata: Creating Exports (continued)
- Creating Jobs to Export Metadata
- Creating Jobs to Export Metadata (continued)
- Scheduling Jobs to Export Metadata

- Scheduling Jobs to Export Metadata (continued)
- Summary
- Practices 8

Loading and Calculating Data

- Objectives
- Data Load Options
- Managing FreeForm Data
- Setting Up the Load File
- Importing Data Overview
- Validating Data Imports
- Importing Data
- Importing Data (continued)
- Scheduling Data Imports
- Scheduling Data Imports (continued)
- Exporting Data
- Exporting Data (continued)
- Scheduling Data Exports
- Scheduling Data Exports (continued)
- Data Calculations
- Member Rollups
- Data Blocks
- Member Formulas
- Business Rules: Overview
- Summary
- Practices 9

Setting Up Application Security

- Lesson Objectives
- FreeForm Security: Overview
- User Authentication and Global Roles
- Application Roles
- Managing Users
- Data and Artifact Security
- Valid Intersections: Overview
- Valid Intersection Groups
- Valid Intersection Rules
- Invalid Data and Invalid Intersection Reports
- Cell-Level Security Rules
- Cell-Level Security Definition
- User and Group Security
- Managing Groups
- Managing User Group Assignments
- Assigning Roles to FreeForm Users and Groups
- Exporting Users and Groups

- Generating Provisioning Reports
- Assigning Access Permissions
- Dimension and Member Security
- Access Options
- Inheritance Options
- Precedence and Inheritance of Access Permissions
- Reporting on Access Permissions
- Summary
- Practices 10

Creating Forms

- Lesson Objectives
- Forms: Overview
- Form Components
- Form Design Considerations
- Designing Forms
- Setting Up the Form Layout
- Setting Up Properties
- Selecting Members
- Setting Up Other Options
- Setting Up Other Options (continued)
- Assigning Business Rules
- Setting Up Smart Push
- Creating Rolling Forecasts
- Modifying Rolling Forecast Variables
- Creating Formula Rows and Columns
- Creating Menus
- Creating Menus (continued)
- Building Validation Rules
- Processing Cells for Data Validation
- Exporting and Importing Forms
- Summary
- Practice 11

Creating Dashboards

- Lesson Objectives
- Dashboards
- Viewing Dashboards
- Designing Dashboards
- Creating Dashboards
- Design Consideration for Dashboards
- Quick Analysis
- Exporting and Importing Dashboards
- Summary
- Practice 12

Managing Business Rules

- Lesson Objectives
- Business Rules Overview
- Calculation Manager Overview
- Business Rule Creation Process
- Determining Calculation Requirements
- Launching Calculation Manager
- Rule Designer Components
- Formula Components
- Variables
- Script, Condition, and Loop Components
- Templates Overview
- Setting Up the Clear Data Template
- Setting Up the Copy Data Template
- Setting Up the Amount-Unit-Rate Template
- Setting Up the Allocate - Level to Level Template
- Setting Up the Allocation Template
- Setting Up the Aggregation Template
- Setting Up the Currency Conversion Template
- SET Commands Template
- Creating Custom-Defined Templates
- Creating Business Rules and Rulesets
- Validating and Deploying Rules
- Assigning Business Rule Security
- Launching Business Rules from Forms
- Launching Business Rules from Task Lists
- Launching Business Rules from the Rules Card
- Summary
- Practice 13

Setting Up Groovy Rules

- Lesson Objectives
- Groovy Overview
- Groovy in Cloud EPM
- Creating Groovy Business Rules
- Groovy Script Basics
- Summary
- Practice 14

Entering FreeForm Data

- Lesson Objectives
- Forms Overview
- Navigation Keys
- Navigating Forms with Menus

- Visual Cues in Forms
- Viewing Member Formulas
- Viewing Consolidation Operators
- Identifying Date Fields, Text Fields, and Smart Lists
- Data Actions
- Editing Data
- Adding Comments and Attachments
- Adding Line Item Details
- Adjusting Data
- Adjusting Data with Quick Commands
- Spreading Data
- Spreading Data by Using Grid Spread
- Spreading Data by Using Mass Allocate
- Filtering and Sorting Data
- Saving and Refreshing Data
- Pushing Data
- Running Business Rules
- Performing Ad Hoc Actions
- Creating an Ad Hoc Grid
- Ad Hoc Grid Properties
- Ad Hoc Options
- Summary
- Practice 15

Reporting on Data

- Lesson Objectives
- Cloud EPM Reports Overview
- Design Features
- Considerations
- Navigating Reports
- Report Security
- Designing Reports
- Designing Reports (continued)
- About Connections and Data Sources
- Report Components and Objects
- Creating Reports
- Report and Object Properties
- General Properties
- Layout Properties
- Report Designer Layout
- About the Report Data Point of View
- Adding Report Sheets
- Inserting Report Objects
- Adding Text Boxes
- Inserting Text Functions

- Inserting Images
- Adding Grids
- Grid Designer
- Setting the Grid POV
- Managing Grid Rows and Columns
- Grouping Data and Non-Data Segments
- Formulas and Calculations in Grids
- Conditional Formatting, Text, and Suppression
- Zooming and Drilling to Content
- Drilling Through to the Source
- Adding Charts
- Chart Designer
- About Shared Report and Objects
- About Shared Report and Objects (continued)
- Considerations for Shared Reports and Objects
- Considerations for Shared Reports and Objects (continued)
- Managing Report Objects
- Correcting Report Errors
- Viewing Reports
- About Books
- About Bursting
- Migrating Financial Reports
- Summary
- Practices 16

Managing Navigation Flows

- Lesson Objectives
- Navigation Flow Overview
- Exploring the Default Navigation Flow
- Interface Customization
- Customization Categories
- Permissions
- Managing Navigation Flows
- Creating a Navigation Flow
- Adding Clusters, Cards, and Tabs
- Organizing Clusters, Cards, and Tabs
- Activating and Switching Navigation Flows
- Embedding Third-Party URLs
- Summary
- Practice 17

Maintaining FreeForm

- Lesson Objectives
- Maintaining Application Overview
- Migration

- Selecting Artifacts and Running Migrations
- Reviewing Migration Status Reports
- Monitoring Applications
- Cloning FreeForm Environment
- Steps to Cloning FreeForm
- Tasks to Perform After Cloning Environment
- Setting Up Data Maps
- Creating Data Maps
- Managing Data Maps
- Running Data Maps
- Adding Data Maps to Forms
- Performing Application Diagnostics
- Summary
- Practices 18

Administering FreeForm in Smart View

- Lesson Objectives
- Smart View Introduction
- Downloading the Smart View Client and Extensions
- Smart View Ribbon and Panel
- Application Templates
- Creating a FreeForm Application
- Adding Artifacts Using the Application Template
- Adding Artifacts Using the Application Template (continued)
- Updating FreeForm Applications in Smart View
- Managing Dimensions in Smart View
- Managing Forms and Dashboards in Excel
- Summary